

reference@edgeSM

PRODUCT OVERVIEW

The only 100% Salesforce® native app for customer reference management. ReferenceEdge centralizes reference data and content in Salesforce, provides a consistent UI (Classic or Lightning), automates time-consuming processes, and leverages the security and scalability of the Salesforce platform. We make it easy to find references and influence opportunities.

▶ **MANAGE & SHARE CUSTOMER CONTENT**

Surface relevant customer content on opportunity pages, share through microsites, track engagement and revenue influenced.

▶ **SEARCH**

Relevant advocate accounts surfaced on opportunity pages. Use filters and keywords together for buyer-relevant results.



▶ **REQUEST AUTOMATION**

Automate the reference request workflow between peers, or with program manager assistance.

▶ **PREVENT REFERENCE OVERUSE**

Set limits on and track how often advocates are used to prevent advocate fatigue.

▶ **PROGRAM MEMBERSHIP MANAGEMENT**

Manage who is referenceable, for what products, which activities, and how often — all within Salesforce.

▶ **PROGRAM METRICS**

Track real-time program performance, including revenue influenced, through pre-built reports and dashboards.

▶ **SECURE & SCALABLE**

Leverage these core attributes of the Salesforce platform for GDPR peace-of-mind. ReferenceEdge resides exclusively in your Salesforce environment.



▶ **PROFILE UPDATE MINDER**

Automate reference data updates through periodic reviews by account relationship owners.

▶ **REFERENCE LEAD FINDER**

Maintain a full pipeline of qualified customer reference candidates.

▶ **ADVOCATE REWARDS**

Reward and recognize customer advocate activities. Sync with Influitive's AdvocateHub.

▶ **USER ADOPTION**

Accelerate Sales adoption by rewarding desired behaviors using built-in gamification.

▶ **TECHNOLOGY INTEGRATION**

Pre-built integrations available are for Influitive, Gainsight™, and TechValidate™. Leverage Salesforce processes, flows and triggers for unique organizational needs.

▶ **PROGRAM HEALTH MONITOR**

Set and track goals for the program that lead to higher top line impact.



point of reference®